

Theme: Marketing (EMEA Launches)

1- EMEA Launch of the T-Mobile G1

Launched the T-Mobile G1 in 6 EMEA markets (30 Oct in UK, 29 Jan in DE-AT-CZ-NL, 23 Feb in PL).

- Sales: ~115k phones sold to date
- T-Mobile marketing activities: ran ATL and BTL campaigns in all 6 markets. All campaigns are currently live.
- Google marketing activities:
 - Co-marketing funds: Committed \$10M to support T-Mobile's ATL campaigns (\$2M spent for UK in Q4 2008; \$4.8M committed in Q1 2009. \$3.2M to be spent in Q2 2009)
 - Ran promotions on local Google properties, including Google homepage, Gmail, Maps, and localized mobile.google.com pages, and set up house ads. **Homepage impressions totalled over 1 Billion**
 - Supported the development of T-Mobile's advertising campaigns and messaging and trained T-Mobile sales and customer support teams on technical and marketing aspects of Android and Google products

2- Upcoming EMEA Launches

- Preparing to launch the **HTC Magic with Vodafone** in 5 largest EMEA markets (UK, ES, IT, FR, DE) in April. No Google co-marketing funds or promotions; "with Google" branding contingent on data plans per market. Additional launches expected with Vodafone in 15 additional markets
- Preparing to launch the **HTC Dream with TIM, Telefonica, and Orange** (in IT, ES, FR) – and **HTC Magic with TIM** in IT – all in March/April timeframe. No Google co-marketing funds or promotions and no "with Google" branding.

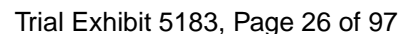
T-Mobile G1: Illustrative EMEA Campaigns



Launched HTC Dream with Optus in AU on Feb. 5 and with SingTel in Singapore on Feb. 21.

- Sales: ~3k phones sold to date (disappointing)
- Only BTL campaigns, limited marketing investment.
- Optus Marketing activities:
 - Press event for 44 journalists/bloggers.
 - Most of the marketing activities focused on online banner ads, microsite, as well as in-retail posters.
- Google Marketing activities:
 - Training and demos at launch event
 - Review and approval of all collateral
 - Launch of mobile.google.xx sites in AU and SG
 - Launch of 'mobile tips' campaign to leverage Android buzz and build local story.

- Preparing to launch the **HTC Magic with NTT DoCoMo** at the end of May. Negotiating Google contribution of \$5M in return for significant marketing commitment from NTT DoCoMo and/or HTC.
- Not involved yet in any China opportunities (China Mobile, China Unicom), but we should ramp up efforts as soon as there is more clarity on launch schedules.



Theme: Marketing (Commercials)

[Life's for Sharing](#) (T-Mobile UK)

[Guitar Hero](#) (T-Mobile UK)

[Glowing Reviews](#) (T-Mobile US)

[HTC Magic Intro](#) (Vodafone France-SFR) - First draft



Key Insights (Andy)

- Overall strategy working
 - Marketshare looks good
 - Operator demand increasing
 - Committed deployments solid
- 1.0 lag
 - Single sourced (HTC) for 1.0
 - Other OEMs building now
 - Estimate a 6-9 month dry spell: Holiday '09 things pick up
- ~1.5 year window of opportunity
 - MSFT dormant, but not out
 - Symbian or LIMO will survive -- too early to tell which one
- Need ability to do direct marketing
 - For all Google experience devices, include a welcome message and direct-to-consumer opt-in option
 - Potentially offer consumers unlocked phones

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Pain Points

- Scaling the business
 - Can't launch every region
 - Prioritization is key - example: SingTel/Optus was a mistake
- Hiring
 - Filling reqs is slow and unpredictable
 - Need to hire in order to make our OKRs
- Innovation
 - Need to hire/acquire a UI team
 - Need more control over HW design
- Ecosystem health
 - Developers need a unified story
 - Don't fragment
 - GOAL: apps should run accross diverse products
 - Marketplace is a unifying service
- Payment systems
 - Checkout isn't a viable solution
 - Too slow, other priorities, legal issues

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Asks

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GOOGLE-01-00136080



END

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BACKUP

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HTC

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MAGIC



HERO

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CLICK



CLICK

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FIESTA

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SAMSUNG

Artemis: Design & CMF

Stylish Android Touch QWERTY

Design Concept

Refined Style

Optimized 4-line QWERTY keys

Differentiated CMF with appealing patterns



Non Slip Silicon textured back cover



Silicon Double Injection



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Caesar: Design & CMF

Design Concept

Ergonomic human body

Lighting effect

Unique CMF (UV high-glossy)

Clean and simple lines



Lighting Effect (Green Light)
& Ceramic Coating



Combined Metal & Plastics

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SAMSUNG

Galaxy A (InfoBowl): Design & CMF

GEN Style
Emphasizing Google,
Ergonomic form



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